

November 6, 2007

TAS-13.1-1007-002
Expiration Date: 11/06/2008
Impacted IRM: 13.1.1

MEMORANDUM FOR TAXPAYER ADVOCATE SERVICE EXECUTIVES,
HEADQUARTERS AND AREA DIRECTORS

FROM: /s/ Nina E. Olson
National Taxpayer Advocate

SUBJECT: Fiscal Year 2008 Taxpayer Advocate Service Program Letter

By statute, the Taxpayer Advocate Service (TAS) helps taxpayers resolve problems with the IRS and recommends administrative or legislative changes that will prevent the problems.¹ Our duties are unlike any others in tax administration. We serve as the taxpayer's voice at the IRS and help taxpayers navigate a complex system by resolving individual cases and systemic problems, and through activities such as research, outreach, the Taxpayer Advocacy Panel, and the Low Income Taxpayer Clinics. TAS accepts cases from all taxpayers who meet our criteria and need assistance. As advocates for taxpayers, all TAS employees play key roles in achieving our FY 2008 Strategies, Operational Priorities, and goals.

Our focus in FY 2008 is to be an accessible advocacy organization that timely and accurately resolves taxpayers' problems, reduces the burden taxpayers' encounter, and protects their rights. TAS is facing two great challenges: to recruit and retain a well-trained workforce sufficient to meet our rising inventory levels, and to develop and maintain systems, programs, and tools that enable employees to advocate effectively. We are implementing an ambitious internal and external recruitment initiative to hire and train a highly qualified, motivated, and diverse workforce that can address taxpayers' needs. To provide all employees with the needed tools, we will modernize existing systems and develop business requirements for an integrated, one-system approach to advocacy. This will allow us to reduce the number of systems required to work on TAS case and systemic issues, create virtual case and project files, and enhance our ability

¹ IRC § 7803(c)(2).

to access, validate, update, and store information. We will continue to place a high priority on employee satisfaction and TAS employees' unique role as the voice for taxpayers within the IRS.

Employee perspective is vitally important to TAS leadership, our organization, and to the taxpayers we serve. We remain committed to actively seeking employees' opinions to improve our business processes, customer service and employee engagement, and to communicating how that input is acted upon to improve our organization and achieve our goals. We will also embark on a new initiative to improve the quality of our work life and workload balance. As we enter the tenth year of the IRS Restructuring and Reform Act of 1998, we will reflect on our accomplishments and renew our commitment to delivering high quality advocacy for taxpayers and to strengthening the organization and our ability to fulfill our statutory mission.²

A vital component of our effort to resolve taxpayer problems and improve employee satisfaction is to update the Service Level Agreements (SLAs) with the IRS operating divisions and functions annually, particularly with respect to the routing and handling of Operations Assistance Requests (OARs). We will test a system of routing OARs via encrypted e-mail, centralize a few OD liaison work units, and develop an electronic OAR routing system to better process and exchange information with the ODs and functions.

We will also implement revised delegated authorities consistent with our role as advocates for taxpayers, and will assist case advocates and managers in accurately and effectively using the modified authorities. These actions will include providing training on IRC § 7811 determinations and reviewing cases for the proper use, classification, and potential issuance of Taxpayer Assistance Orders (TAOs). The TAO is a statutory authority and an effective case management tool used to eliminate significant hardship experienced by the taxpayer as a result of economic factors or systemic failures. This year, electronic TAO templates will offer case advocates a new method of easily completing and transmitting the form to management. A streamlined approval process will eliminate further delays in resolving taxpayers' problems and reduce burden on case advocates and managers.

Another element of serving taxpayers is to deliver the right work to employees who have the right training, skills, and availability to handle it.³ To accomplish this objective and enhance our case intake process, we will emphasize reducing inappropriate referrals to TAS. This effort involves re-branding the NTA toll-free line through education and outreach, with a major education initiative aimed at IRS employees. We will increase the locations, hours, and employees assigned to

² In the IRS Restructuring and Reform Act of 1998, Pub. L. 105-206, Congress renamed the Taxpayer Advocate the National Taxpayer Advocate and created the structure of the Taxpayer Advocate Service.

³ National Taxpayer Advocate, *Common Sense and Good Judgment in Case Processing II* (Oct. 4, 2006).

answer 1-877-ASK-TAS1 calls. We will provide Over the Phone Interpreter service to Chinese, Korean, Vietnamese, and other non-English speakers to serve those taxpayers more effectively. We will also continue efforts to identify our growing population of underserved taxpayers, improve communication and outreach strategies to make all taxpayers aware of TAS's purpose, and will develop strategies to include middle-income families.⁴

TAS research and advocacy efforts in partnership with the IRS will focus on the services taxpayers need to foster voluntary compliance.⁵ As an organization, we will achieve greater transparency and monitor the transparency of the IRS to ensure taxpayers have the necessary information to make the tax system work openly and fairly for all. Most importantly, we will approach our daily work in a way so the IRS will:

- ♦ Understand TAS's statutory mission and authority;
- ♦ Consider the downstream impact of IRS policy decisions, initiatives, and work processes on taxpayers and TAS's workload;
- ♦ Monitor, analyze, and report its effectiveness in handling OARs; and
- ♦ Review and respond to recommendations from the National Taxpayer Advocate.

These are just a few of our strategies for meeting the challenges TAS faces.⁶ The attached FY 2008 Business and Performance Goals, along with the Operational Priorities, identify actions and measures to further our advocacy efforts. We will issue a strategic plan later this year that defines our five-year goals and objectives. I am confident that we will continue to succeed in FY 2008 and beyond.

Attachments:

FY 2008 Operational Priorities

FY 2008 TAS Business Goals and Performance Measures

⁴ Russell Research, *Report of Findings from the 2007 Market Research for The Taxpayer Advocate Service* (Sept. 6, 2007)

⁵ National Taxpayer Advocate FY 2008 Objectives Report to Congress.

⁶ National Taxpayer Advocate FY 2008 Objectives Report to Congress.

Attachment 1

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TAS Strategy I: Advocate changes in tax law or procedures that protect taxpayer rights, reduce taxpayer burden, and improve IRS effectiveness.

I - A Advocacy Initiatives

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IA1	Complete an analysis of the effectiveness of collection payment alternatives.	Final report and recommendations.	EDSA		10/31/2007
IA2	Criminal Investigation Refund Freezes: (1) verify that the IRS affords appeal rights to taxpayers who elect to exercise these rights after the IRS disallows their refund claims; and (2) assess the effectiveness of CID filters that classify return filings as fraudulent refund schemes.	Final Report.	EDSA		10/31/2007
IA3	Work with the Office of Privacy and Information Protection (OPIP) to ensure that comprehensive solutions to stolen identity problems are actively explored and all necessary components of the IRS are engaged to assist OPIP.	Develop recommendations.	EDSA		9/30/2008
IA4	Stolen Identities: Engage the Social Security Administration (SSA) to expedite its determinations of lawful Social Security Number (SSN) owners.	Make recommendations.	Supervisory Attorney Advisor		9/8/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IA5	Advocate with the Collection Policy office regarding the IRS's need to assume a greater role in assisting taxpayers in Payroll Service Provider (PSP) cases, including: (1) assuming the responsibility to notify affected taxpayers when the IRS becomes aware of a defunct PSP; (2) providing enhanced disclosures on Form 2678 about the consequences of using a PSP; (3) discontinuing the practice of changing the employer's address to that of the PSP unless there is clear authorization from the employer; (4) issuing a notice to taxpayers when making address changes; (5) issuing duplicate collection notices to affected employers and the PSP; and (6) temporarily suspending collection of the accounts of affected employers to provide them a sufficient opportunity to explore payment alternatives.	Improvements to processes and procedures.	EDSA		10/31/2007
IA6	Help the IRS adopt policies and procedures consistent with its stated public policy "to accept an offer when it is unlikely that the tax liability can be collected in full and the amount offered reasonably reflects collection potential."	Outline needed IRS procedures.	EDSA		10/31/2007

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IA7	Oversight Board Measure: Develop outcome measures to document progress toward reducing identified problems. Monitor improvements. Expand the pilot project to address issues with SB/SE CAWR/FUTA Program and TE/GE determination letters. Continue to work with the operating divisions to develop further measures.	(1) Implement recommendations and determine effectiveness. (2) Additional W&I outcome measure. (3) SB/SE Outcome Measure. (4) TE/GE Outcome Measure.	EDSA		9/30/2008
IA8	Review IRS core measures and practices that result in the IRS not effectively resolving taxpayer problems at the first opportunity and ultimately sending the case to TAS.	Delivery of results.	Director, FSA	Director, Research	6/30/2008
IA9	The Impact of the Taxpayer Increase Prevention & Reconciliation Act of 2005 on the IRS's Offer in Compromise Program: Urge the IRS and Treasury Department to issue regulations (and other guidance) that include measures, similar to those proposed in the 2006 ARC, to preserve accessibility of the OIC program.	Develop recommendations.	EDSA		10/31/2007
IA10	The Federal Payment Levy Program (FPLP): Collaborate with the IRS to determine whether an effective income filter could be created and implemented to assist in identifying taxpayers who experience a hardship because of the FPLP.		Director, Research	EDSA Director, V&S	10/31/2007

I - B Annual Report to Congress (ARC)

<i>Num ber</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IB1	Develop Most Serious Problems (MSPs) and deliver the ARC.	Timely delivery of the ARC.	EDSA	Director, C&L	12/31/2007
IB2	Identify FY 2008 MSPs.	Prepare MSP outlines.	EDSA		5/31/2008
IB3	Monitor and report back with status updates on high priority problems in each subsequent year's Annual Report to Congress.	Complete and timely status updates.	EDSA		12/31/2007
IB4	Facilitate timely and effective tracking of the IRS's response to the National Taxpayer Advocate's recommendations in the ARC by: (1) providing a compilation of the recommendations proposed in the ARC to the operating divisions with a memorandum requesting a response to each recommendation and post the responses on the IRS Intranet and public Internet sites; and (2) report status updates on the TAS intranet site on a semi-annual basis with the due dates to coincide with the Objectives Report and the ARC and post on the TAS website and the IRS intranet.	Timely and accurate posting.	EDSA	Director, C&L	10/31/2007

I - C Immediate Interventions

<i>Num ber</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IC1	Establish a clear set of criteria for the effective and timely creation of immediate interventions and advocacy projects from issues submitted on the Systemic Advocacy Management System (SAMS)	Revised/updated Systemic Advocacy IRM.	EDSA	Director, TAG	4/30/2008
IC2	Meet regularly with IRS executives to identify emerging issues and to provide pre-decisional input on policy matters. 2. Work with the IRS to improve the identification of emerging issues related to collection and examination.	Recommendations and/or reports.	EDSA		9/30/2008

I - D Systemic Advocacy

<i>Num ber</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
ID1	Improve efforts to integrate advocacy throughout TAS by creating processes and working groups that involve other parts of TAS including Technical Analysis and Guidance (TAG), Vision and Strategy (V&S), Local Taxpayer Advocates (LTAs), Field Systemic Advocacy (FSA), and the Integrated Technical Advisor Program (ITAP).	Assess impact.	EDSA	Director, TAG Director, V&S LTA(s) Director, ITAP Director, FSA	6/30/2008
ID2	Monitor accuracy of time reporting for Advocacy Projects, Immediate Interventions, and Annual Report to Congress.	Access increases in accuracy.	EDSA		9/30/2008

I - E Taxpayer Advocacy Panel

<i>Num ber</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IE1	Representatives from the TAP Joint Committee will present the 2007 TAP Annual Report to the Commissioner.	Publish Annual TAP Report.	Director, TAP	Director, C&L	4/30/2008
IE2	Emphasize expanding the recruitment pool, renewing the TAP charter, and further refining the recruitment process.	Extend TAP Charter to 2010, and expand diversity in TAP Panel members.	Director, TAP		6/30/2008
IE3	Continue to focus on identifying improvement opportunities through member surveys and establishing baseline data for committee and issue effectiveness measures.	Set effectiveness goal.	Director, TAP		9/30/2008

I - F Taxpayer Assistance Order (TAO)

<i>Num ber</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IF1	Develop an electronic version of Form 9102, Taxpayer Assistance Order, to use in frequently encountered situations that warrant a TAO.	Completion of the E-9102 and timely training on its use.	Director, TAG	Director, Emp Dev Director, BSP	3/13/2008
IF2	Monitor the usage of the E-9102 to determine if it improves the processing time for TAOs.	Feedback survey from users.	Director, TAG	Director, Bus Assmnt Director, BSP	12/31/2008
IF3	Train IRS and TAS employees to use the Electronic Form 9102.	Complete timely training.	Director, TAG	Director, C&L Director, Empl Dev	6/30/2008
IF4	Create standard fillable TAO forms and templates of common issues to streamline the TAO process.	Timely and accurate completion of the templates.	Director, TAG	Director, BSP	6/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IF5	TAS will monitor the use of the revised Form 911, Application for Taxpayer Assistance Order, to identify any areas of confusion or improvement.	Provide findings.	Director, TAG	Director, C&L Director, Bus Assmnt	4/30/2008

I - G Focused Improvement Efforts for TAS Offices in Large Cities

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IG1	Develop a strategy to research, identify, and address potential challenges to improving customer satisfaction in offices located in the largest cities and metropolitan areas.	Increase percentage of customers satisfied.	Director, Bus Assmnt	EDCA Area Director(s) LTA(s)	9/30/2008
IG2	Conduct a study in offices such as Manhattan, Brooklyn, Springfield (NJ), Los Angeles, and Chicago, sampling and reviewing casework from these offices to identify types of cases and skills needed by employees to work the cases of taxpayers in large cities.	Develop recommendations and final report.	Director, Bus Assmnt	EDCA Area Director(s) LTA(s)	9/30/2008

I - H TAS Research Initiatives

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IH1	Support W&I Research in the development of a five-year research plan for taxpayer service.	Assist W&I Research with implementation of the five-year research plan for taxpayer service. This is an on-going process to occur over a five-year period.	Director, Research	Director, V&S	9/30/2008
IH2	Analyze the Taxpayer Assistance Centers (TACs) with W&I to develop a plan to evaluate all TACs and identify some of the 401 TACs for potential closure or relocation. Use accurate and complete data in the analysis and decision making process.	Assist W&I with completion of the TAC evaluation plan.	Director, Research		9/30/2008
IH3	Assist the TAP in conducting a research study to determine why taxpayers visit IRS TACs, how satisfied participants are with the services provided, and what services work well or need improvement. Identify services that taxpayers need, but that are not currently available from the TACs.	Complete studies.	Director, TAP	Director, Research	12/14/2007
IH4	Sponsor research by the IRS Office of Program Evaluation and Risk Analysis (OPERA) to employ agent-based modeling techniques to simulate the EITC certification trial that occurred in Hartford CT in 2004 - 2005.	Completion of research.	Director, Research		10/31/2007
IH5	Conduct a joint study with CI to review the verification process. Review a representative sample of cases from the 2007 filing season that the Office of Refund Crimes identified as fraudulent.	Complete study.	Director, Research		9/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IH6	Evaluate the impact of representation on the ultimate outcome of EITC audits.	Final report.	Director, Research		9/30/2008
IH7	In a joint effort with the SB/SE, explore alternatives for improving compliance in the "cash economy" portion of the tax gap.	Develop recommendations about the most promising approaches for further study.	Director, Research		10/30/2007
IH8	Collaborate with W&I Research to study FPLP hardship and non-hardship cases to determine whether a reliable filter can be developed, using systemically available information, to identify taxpayers who would experience a hardship if subjected to an FPLP levy.	Complete study.	Director, Research	EDCA Director, TAG Director, V&S	12/31/2007
IH9	Explore the role of preparers in bringing taxpayers into compliance, the types of and causes for preparer errors, and the role of preparers in facilitating noncompliance, through review and analysis of available information on the role of preparers and other intermediaries in facilitating compliance or noncompliance with the law.	Develop recommendations and interim report for improving accuracy and compliance by tax return preparers, and further research studies to understand the role of preparers in fostering tax compliance or noncompliance.	Director, Research		10/31/2007
IH10	Study, identify, and analyze the reasons why taxpayers comply with the tax laws.	Final report including recommendations.	Director, Research		10/31/2007
IH11	Identify EITC Correspondence Audit Barriers in collaboration with the EITC Office and W&I Research.	Final report.	Director, Research		10/30/2007
IH12	Review the budget initiatives of each IRS operating division and determine which initiatives impact the TAS workload in FY 2008 and beyond.	Refine projection models and develop additional models.	Director, Research	Director, V&S Director, Finance	6/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IH13	TAS will continue its efforts to ensure that the IRS is providing face-to-face service to all taxpayers who need it, and not simply moving the delivery of taxpayer services to the Internet.	Continued analysis.	Director, Research		9/30/2008

TAS Strategy II: Improve TAS's Ability to Identify and Respond to Taxpayer Concerns.

II - A Case Advocacy

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIA1	Analyze TAS's workload to identify where IRS "shrugging" is occurring, and develop Taxpayer Assistance Order templates to return such cases for immediate action by the IRS.	Complete analysis and make recommendations.	Director, TAG		6/30/2008
IIA2	TAS Actions to Promote Taxpayer Privacy: Promote secure handling of taxpayer information. A flyer has been developed and is awaiting executive approval. [Area 1]	Release of flyer.	Area Director(s)		12/31/2007
IIA3	Develop requirements of an automatic case assignment process for system development.	Report on the requirements of an automatic case assignment system.	EDCA		7/30/2008

II - B Delegated Authorities

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIB1	Implement modifications to TAS's delegated authority.	Revise Delegation Order 267 and IRM 13.1.4. Issue training material in the form of Talking Points and Questions & Answers.	Director, TAG		10/31/2007
IIB2	Communicate and train TAS employees on the modifications to TAS's delegated authorities.	Completion of training.	Director, TAG		10/31/2007

II - C Low Income Taxpayer Clinics

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIC1	Fund at least one clinic in every state as well as the District of Columbia, Puerto Rico, and Guam.	Increased applicants. Combination of clinic outreach events and increase of eligible contacts received.	Director, LITC		9/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIC2	Conduct an in-depth site visit for every clinic at least once every three years. Use weighted criteria to determine which clinics to visit each year. During calendar year 2008: (1) each new clinic funded in 2008 will receive an on-site assistance visit; and (2) every clinic funded in 2008 will be visited by the LTA in the geographic area where the clinic is based. (3) complete 30 percent of site visits of the returning clinics funded in 2008.	Complete reviews timely.	Director, LITC		9/30/2008
IIC3	Develop goals and performance measures to evaluate the success of the LITC program.	Implement goals and performance measures.	Director, LITC		12/31/2007
IIC4	Work with the LITCs to capture statistics and anecdotal information about LITC casework and outreach activities.	Publish LITC Annual report.	Director, LITC		5/31/2008
IIC5	Continue to market the LITC program in states underserved by LITCs to identify organizations that may be interested in opening clinics.	Increased applicants. Combination of clinic outreach events and increase of eligible contacts received.	Director, LITC		6/30/2008

II - D TAS Intake Strategy

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IID1	Develop marketing material for offices in the targeted areas to use in promoting the re-branded intake line.	Release materials.	Director, C&L		11/30/2007

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IID2	Increase the number of staff working at consolidated intake sites and begin to integrate other incoming workload such as DI receipts or those who contact TAS electronically or in writing.	Increase the available staff and handle the intake process for some non-telephone workload at the intake sites.	Project Mngr, Intake Strat		7/30/2008
IID3	Develop an initial plan to consolidate intake work in the six intake sites.	Plan implementation.	Project Mngr, Intake Strat		9/30/2008

II - E A More Expansive Concept of Taxpayer Compliance

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIE1	Reclassify TAS receipts into three categories of IRS actions: Customer Service, Enforcement, and Compliance.	Complete reclassification.	Director, TAG		6/30/2008
IIE2	Conduct statistical analysis on trends within each category: Customer Service, Enforcement, and Compliance.	Provide findings.	Director, TAG		9/30/2008

II - F Business Assessment

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIF1	Redesign and enhance TAS's quality measurement standards to address the numerous changes in casework and processing that have occurred since TAS began.	Finalize proposals for new quality attributes.	Director, Bus Assmnt		6/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIF2	Develop action plans to achieve the office quality goal.	Achieve or exceed the office quality goal.	LTA(s)		10/31/2007
IIF3	The EDCA and Area Directors will convene at least one Case Review Panel per area.	Timely completion of reviews, report, and planned actions.	EDCA		9/30/2008
IIF4	Perform annual workload reviews approximately at mid-year for each employee.	Timely completion of reviews and feedback.	TAS Leadership		4/30/2008
IIF5	Obtain recommendations from all TAS employees to develop enhanced TAS quality measurement standards.	Develop measures.	Director, Bus Assmnt		12/31/2007
IIF6	Develop requirements for a new centralized Quality Review process and design an interim solution.	Implement an interim solution. Submit requirements to MITS through the Integrated TAS System (ITS).	Director, Bus Assmnt		12/31/2007
IIF7	Local Taxpayers Advocates (LTAs) and Taxpayer Advocate Group Managers (TAGMs) will review two (2) closed cases per quarter for each employee (evaluative).	Timely completion of reviews and feedback.	LTA(s)		9/30/2008
IIF8	LTAs and TAGMs will review every case over 100 days old and every 60 days thereafter and provide guidance to the case advocate to bring the case to closure (non-evaluative or evaluative). Alternatively, analysts and lead case advocates may be directed to perform non-evaluative case reviews.	Timely completion of reviews and feedback.	LTA(s)		9/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIF9	LTAs and TAGMs will perform an early intervention review within 10 - 21 days of the Taxpayer Advocate Received Date (TARD) for at least 10 percent of the case receipts each week during September through January, and for at least 5 percent during February through August (evaluative or non-evaluative). Alternatively, analysts and lead case advocates may be directed to perform non-evaluative case reviews.	Timely completion of reviews and feedback.	LTA(s)		9/30/2008
IIF10	Develop a measure of efficiency that incorporates case complexity, quality, and a cost measure in order to improve case advocacy performance measures.	Baseline case advocacy efficiency measure.	Director, Bus Assmnt		9/30/2008
IIF11	Develop a system and/or process for monitoring and reporting out on Systemic Advocacy performance measures and indicators.	Implement measures and targets. Assess program effectiveness.	EDSA		9/30/2008
IIF12	Implement TAMIS time tracking system Phase II based on business system requirements.	Implement the enhanced time reporting system.	Director, BSP		12/31/2008
IIF13	TAS Balanced Measures Study - Identify high and low performing offices by size based on balanced measures and benchmark both tangible and intangible factors to improve performance of low performing offices.	Complete study and make recommendations.	Director, Bus Assmnt		4/30/2008
IIF14	Develop necessary guidance and training for the TAMIS time tracking process.	Delivery of the guidance and training.	Director, TAG		3/31/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIF15	Greater emphasis on providing TAS employees with more actionable data to drive improved customer satisfaction results.	Quarterly reports to TAS liaisons.	Director, Bus Assmnt		4/30/2008
IIF16	TAS Customer Satisfaction: Report on the percentage of satisfied customers.	Delivery of product.	Director, Bus Assmnt		4/30/2008
IIF17	Update supporting products that foster informed participation of employees in our efforts to improve customer satisfaction, including a user's handbook and an educational video.	Complete and release user's handbook and educational video.	Director, Bus Assmnt		12/31/2007
IIF18	Develop and administer an internal Systemic Advocacy customer satisfaction survey.	Prepare a report to include the survey results and recommended improvements, and adopt recommendations.	EDSA		6/30/2008
IIF19	Prepare guidance and training on case complexity system.	Delivery of the case complexity system on TAMIS.	Director, TAG		9/30/2008
IIF20	Implement a second phase of the TAMIS Time Reporting system that will allow users to manually modify or add time to cases for work done when not accessing the case via TAMIS (for example, when talking with taxpayers, performing research, or accessing other IRS systems).	Full implementation of TAMIS Time Reporting system.	Director, BSP		12/31/2008

II - G Communication & Liaison

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIG1	Use the market analyses from Russell Market Research and TAS's Internal Survey to identify underserved taxpayers and understand how best to reach them.	Present the revised outreach strategy at the 2008 Congressional Affairs Program (CAP) Conference.	Director, C&L		2/10/2008
IIG2	Develop local office outreach plans, with a minimum of 40 grassroots activities. Each office will reach out to at least four organizations serving taxpayers with disabilities.	Number of outreach efforts to organizations serving taxpayers with disabilities. Timely complete and deliver local office outreach plans.	LTA(s)		9/30/2008
IIG3	Ensure all IRS employees undergo adequate training on taxpayer rights and are aware of the role and authority of TAS.	Delivery of TAS Awareness DVD, TAS and Taxpayer Rights PowerPoint, and Publication 4571, Taxpayer Advocate Service and Taxpayer Rights.	Director, C&L		5/31/2008
IIG4	Publish guidance material for TAS employees on TAS's Intranet site utilizing established IRM and communications guidelines.	The recall/reposting rate will be less than five percent.	Area and HQ Directors		9/30/2008
IIG5	Include a poll question on taxpayer rights on the IRS Intranet site in conjunction with the delivery of the Annual Report to Congress.	Timely posting of the poll questions. Tabulate and provide results.	Director, C&L		3/31/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIG6	Include direction to LTAs on internal outreach in the FY 2008 Outreach Program Letter.	Completion and timely delivery of the FY 2008 Outreach Program Letter.	Director, C&L		10/31/2007
IIG7	Utilize the results from the Russell Marketing Survey to modify the communications strategy and local outreach plans targeting underserved taxpayers.	Present the revised outreach strategy at the 2008 Congressional affairs Program (CAP) Conference.	Director, C&L		2/10/2008
IIG8	Partner with LITCs, volunteer return preparers and other community groups to distribute the Tax Toolkit to educate their customers.	Distribute 10,000 toolkits (including electronic distribution) to targeted taxpayers.	Director, C&L		1/31/2008
IIG9	Increase internal outreach and communication of Systemic Advocacy activity, including communication of new projects started and results of projects completed.	Increase number of appropriate SAMS submissions.	EDSA		9/30/2008

II - H Institutionalize the Authority of TAS Within the IRS

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIH1	Ensure the IRS understands TAS's statutory mission and authority.	Completion of TAS's internal outreach plan.	TAS Leadership		9/30/2008
IIH2	Facilitate IRS's actions to ensure it monitors, analyzes and reports on its effectiveness in handling of TAS OARs.	Obtain feedback through the SLA process and portal reports.	Director, TAG		1/1/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIH3	Increase the use of Taxpayer Assistance Orders (TAOs) as a case management tool by developing templates, conducting training, and updating the Internal Revenue Manual (IRM).	Monitor the number of TAOs issued.	Director, TAG		6/30/2008

II - I Desktop Integration

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
III1	Update taxpayer contact information automatically on TAMIS when updates are entered on IDRS through DI.	Implement the features.	Director, BSP		9/30/2010
III2	Train TAS employees on the new Desktop Integration features.	Completion of the training.	Director, BSP		9/30/2010

II - J Strategic Planning

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIJ1	Develop a TAS Five-Year Strategic Plan to include: (1) a description of TAS's goals and objectives for the next five years; (2) a description of how the goals and objectives will be achieved, including operational processes, skills and technology, human capital information, and other resources required to meet those goals and objectives; (3) a description of performance measures TAS will use to evaluate the effectiveness of the plan; and (4) key external factors that could significantly affect achieving the goals.	Deliver draft strategic plan to TAS Executives.	Director, V&S		1/31/2008

II - K TAS Systems Future Vision

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIK1	Create a mechanism to effectively link data from the Taxpayer Advocate Management Information System (TAMIS) to submissions on the Systemic Advocacy Management System (SAMS) to improve the identification of systemic problems appearing in TAS case work.	Implement SAMS II Release I. Use existing SAMS reports to track.	Director, BSP		4/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIK2	Work with MITS to implement the critical needs and system enhancements that Systemic Advocacy has identified for improving SAMS, including integration of SAMS and TAMIS infrastructure, security enhancements, compliance with § 508 of the Rehabilitation Act, and document attachment technology.	Implement SAMS II Release I.	Director, BSP		4/30/2008
IIK3	Develop a systems roadmap to direct future changes and enhancements to TAS systems. Reduce the number of separate applications required to work on TAS cases and issues, create complete electronic case files, centralize document storage, enhance TAS's ability to update and validate its data, and provide improved tools to all TAS employees and managers.	Submit Business Capabilities Definition (BCD) document to MITS Vision & Strategy (MV&S).	Director, BSP		10/15/2007
IIK4	Web Migration: Pursuing a COTS solution by working with the IRS Portal Project Team.	Present options for the TAS web to TAS Executives and Director, C&L.	Director, BSP		9/30/2008
IIK5	Collaborate with MITS and other IRS business units to automate reporting and analysis of IRS system activity (e.g. IDRS, TAMIS, DI, etc.) with the goal of more quickly recognizing events that might require SA intervention.	Incorporate requirements into TAS Integrated System (TIS) Business Capabilities Definitions.	Director, BSP		10/15/2007

II - L Systemic Advocacy Management System (SAMS)

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIL1	Complete SAMS enhancements (improved system research features, expanded tools for recording project development, and an archive for housing project research documents).	Implementation of SAMS II Release I.	Director, BSP		4/30/2008
IIL2	Train TAS employees on the SAMS enhancements.	Complete training.	EDSA		9/30/2008

TAS Strategy III: Identify Significant Sources of TAS Casework and Work with Operating Divisions on Strategies to Improve Case Referrals to TAS.

III - A Advocacy Projects

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIIA1	Track and report on the status of advocacy proposals and the outcomes of recommendations made as a result of these proposals.	Implement approved project recommendations.	EDSA		9/30/2008
IIIA2	Assess the impact of the Private Debt Collection Initiative.	Develop report.	EDSA		9/30/2008

III - B Internal Revenue Manual

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIIB1	Revise IRM 13 to eliminate the requirement for Area Director TAO review, and require TAG, CNTA, and technical advisor assistance in development and issuance of a TAO.	Issue an accurate IRM timely.	Director, TAG		12/31/2007
IIIB2	Institute and support effective processes for managing TAS internal management documents that include: (1) Designating an IMD Coordinator and team who has the authority to make decisions and implement changes; (2) Setting clear expectations for subordinate managers; (3) Developing and implementing measures to ensure the IRM reflects current operations, procedures, instructions, and new or reengineered processes; (4) Regularly making updates in the IRM to reflect changes in policy (Commissioner or Business Unit Delegation Orders and Agency Policy Statements) and organizational structure (functional statements); (5) Establishing procedures to manage "interim guidance" as prescribed in IRM 1.1.1 and to comply with Freedom of Information Act requirements; and, (6) Maintaining a well-trained and skilled cadre of IRM authors.	Timely updates of TAS IRMs, guidance issued timely using established guidelines.	TAS Leadership		10/31/2007

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIIB3	Publish the following new IRM sections: Receipt and Assignment of TAS Cases, TAS TAO Process, Technical Advisors, and TAS Case Closing and Re-open Procedures.	Publishing completed timely.	Director, TAG		12/31/2007
IIIB4	Fully utilize the Internal Management Document (IMD) review process to provide recommendations to the IRS on IRS procedures to ensure taxpayer rights are protected.	100% review of clearances.	TAS Leadership		9/30/2008
IIIB5	All TAS Executives and HQ Directors will have a specific commitment about transparency in their annual performance plans.	Commitment included in FY 2008 performance plans.	NTA		10/31/2007

III - C Operations Assistance Requests (OAR)

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIIC1	Develop the business requirements to create an electronic OAR platform to enable electronic routing of OAR information back and forth from TAMIS to the IRS DI system.	Provide comments on Automated OAR requirements UWR.	Director, TAG		10/31/2007
IIIC2	Additional Training on case development and OAR routing will be provided to TAS employees to address any identified training needs.	Complete training.	Director, TAG		9/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIIC3	Work with the IRS operating divisions to develop interactive mechanisms to assist case advocates with OAR routing and to minimize misrouted OARs and delays in case resolution.	Implement E-OAR.	Director, TAG		9/30/2010
IIIC4	Revise the Form 12412 to clearly define completion dates; require case advocates use the most expeditious methods to submit an OAR (i.e., facsimile or secure e-mail); and revise the "Action Taken" and "Reason Rejected" sections of Form 12412 for greater clarity. Incorporate actions outlined in the National Taxpayer Advocate's response to TIGTA Audit #2007-10-068, Inefficiencies in Processing Operations Assistance Requests Caused Taxpayers Unnecessary Delays, into the finalized Form 12412.	Complete revisions to the Form 12412.	Director, TAG		3/31/2008
IIIC5	Study misrouted OARs to determine the common causes of the problem, and provide training and clarification on the processes that have a high rate of rejected OARs.	Decrease the number of rejected OARs.	Director, TAG		3/31/2008
IIIC6	Campus Procedures Variation Study - Provide templates and OAR processing guidance for OARs routed to the ten campuses.	Posting of additional and updated templates.	Area Director(s)		9/30/2008
IIIC7	Partner with the IRS to identify areas where OAR processing could be centralized.	Decrease in the number of misrouted OARs.	Director, TAG		9/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIIC8	Reduce rejected OARs by 10 percent nationally through systemic improvement.	Achieve an 11.4 percent reject rate.	Director, TAG		9/30/2008
IIIC9	Add more specific OAR information for other Campus processes to the Campus Procedures Variation Project web page.	Add a new process to the web site every 10 - 12 weeks.	Area Director(s)		9/30/2008
IIIC10	Develop a tool to help case advocates determine where to route an OAR using the IDRS Decision Assisting Program (IDAP). (TIGTA OAR Audit 36)	Incorporate capability into BCD for TAS Integrated System. Develop requirements for the tool.	Director, TAG		10/15/2007
IIIC11	TAS is working to fully implement the electronic routing of Form 12412, Operations Assistance Request, to improve the routing process and the exchange of information with the operating divisions and functions that respond to OARs. The new electronic system will: (1) Provide a paperless system of sending OARs from TAMIS through DI to the ODs and functions; (2) Allow for attaching electronic supporting documentation to the OAR; (3) Provide an electronic format for ODs and functions to document actions and resolution information via DI, which will upload to TAMIS for use by TAS case advocates; (4) Ensure confidentiality of TAMIS data; and (5) Provide adhoc statistical reports regarding OAR activity.	Implementation of E-OARs.	Director, BSP		9/30/2010

III - D Service Level Agreements with IRS Operation Divisions and Functions

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IIID1	Implement a more streamlined process for negotiating and updating SLAs with the business units.	Implement the new process to reduce the # of days the SLA is in the negotiation process.	Director, TAG		12/31/2007
IIID2	Update the Service Level Agreements (SLAs) to require the IRS Operating Divisions (OD) to contact TAS and provide TAS an opportunity to "perfect" an OAR prior to the OD rejecting it.	Requirement incorporated into the SLAs. Annual updates.	Director, TAG		7/31/2008
IIID3	Finalize Appeals and CI SLAs by 09/15/2007, W&I and SB/SE SLAs by 01/31/2008, and LMSB and TEGE SLAs by 03/31/2008. Implement actions outlined in the National Taxpayer Advocate's response to TIGTA Audit #2007-10-068, Inefficiencies in Processing Operations Assistance Requests Caused Taxpayers Unnecessary Delays, into the finalized SLAs.	Drafts provided to the NTA timely.	Director, TAG		3/31/2008

TAS Strategy IV: Ensure the Human Resource Component of TAS is Adequate to Meet Its Workload Demands

IV - A *Business Resumption and Disaster Relief*

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVA1	Advocate for the IRS to establish a standing committee to proactively conduct practice drills in areas at risk for natural disasters. These "practices" will enable IRS to improve its current disaster plans and increase readiness in these locales.	Number of practices to test plans.	Director, V&S		3/31/2008

IV - B *EEO and Diversity*

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVB1	The NTA, DNTA, EDCA, and EDSA will take steps to hire individual with targeted disabilities within their organization. TAS HQ Directors will take significant steps to hire persons with disabilities and students with disabilities through the Workforce Recruitment Program (WRP). Each Area Director will hire at least one individual with a disability through a Schedule A appointment and one student with a disability through the WRP.	Individuals hired.	TAS Leadership		6/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVB2	Convene a team to conduct a comprehensive self-assessment of EEO and Diversity in TAS in accordance with Management Directive 715 guidelines.	Complete TAS assessment. Identify deficiencies and recommendations on how to address deficiencies.	Director, EEO		9/1/2008
IVB3	Establish a process for recognizing TAS Management Officials who demonstrate outstanding support of TAS EEO objectives.	Implement process.	NTA's EEO Advis. Comm.		6/1/2008
IVB4	Analyze responses to exit interview surveys and identify EEO barriers.	Complete analysis and provide recommendations to address identified EEO barriers.	Director, EEO		12/1/2007
IVB5	Conduct accessibility study to determine barriers that employees with disabilities encounter when accessing TAS's electronic systems and information, products, and services.	Complete study and recommendations on how to remove barriers.	Director, EEO		9/30/2008
IVB6	Promote initiatives and programs, including Alternative Dispute Resolution (ADR), that facilitate a greater understanding of EEO and diversity issues, workplace culture, and a positive work environment.	Improve Employee Satisfaction Results for all EEO groups; increase Alternative Dispute Resolution (ADR) participation.	Director, EEO		9/30/2008

IV - C Recruitment, Retention, and Training

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVC1	Develop an aggressive and creative internal and external recruitment plan to hire from a diverse pool of applicants, including those with bilingual skills and targeted disabilities to include 240 case advocates, 40 Intake Advocates, and 10 - 15 Technical Advisors; and meet the growing need of taxpayers for TAS services.	Implement recruitment plan and hire planned number of case advocates, intake advocates, and technical advisors.	Director, Recruit. & Hiring		9/30/2008
IVC2	Develop and implement a training plan for internal and external new hires that includes: classroom instruction, on-the-job training, coaching, as well as continuing professional education provided to all employees. Take advantage of new technology to develop training in a variety of methods suited to the material and the trainee.	Implement training plan. Track effectiveness.	Director, Empl Dev		12/1/2007
IVC3	Time Utilization Study - Determine the activities of LTAs, managers, local office senior analysts, grade 11 analysts, LTA secretaries and group secretaries and obtain data to assist with determinations of staffing levels for these positions. [Area 7]	Present recommendations to AAB.	Area Director(s)		4/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVC4	Expand the TAS hiring process to include external applicants from a diverse pool of applicants, including those with bilingual skills and targeted disabilities. Adapt the various recruitment products and procedures for use in recruiting for additional TAS positions.	Implement external recruitment plan and hire planned number of case advocates, intake advocates, and technical advisors.	Director, Recruit. & Hiring		4/30/2008
IVC5	Intake Advocate Implementation Team - Develop and implement recommendations related to hiring, training, and employee development of Intake Advocates. Area 3	Implement recommendations.	Project Mngr, Intake Strat		9/30/2008
IVC6	Continue to focus on leadership development through Frontline Leadership Readiness Program and Senior Management Readiness Program, and place a priority on funding the Front Line Manager and Senior Manager Courses.	Number of candidates completing the program.	Area Director(s)		9/30/2008
IVC7	Coordinate with HCO to place TAS information on the HCO's recruitment webpage.	Post recruitment folder.	Director, C&L		10/31/2007
IVC8	Develop a recruitment folder in support of the hiring initiative. The recruitment folder will include inserts on the case advocate and intake advocate positions. Vet the folder within the TAS organization.	Present the final draft of the recruitment folder to the NTA/DNTA for approval.	Director, C&L		10/31/2007

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVC9	Within 10 days of approval from the NTA/DNTA, forward the recruitment folder to Publishing for printing, subject to funds availability. Post recruitment folder to the web. Deliver the folders to CIDS for distribution. Notify all managers of recruitment folder availability through the Manager's Forum.	Post recruitment folder to the web.	Director, C&L		1/30/2008
IVC10	Develop and deliver training related to both legislative changes and changes to IRS operating division procedures, focused on the advocacy role of TAS. (Filing Season Readiness)	Timely delivery of the 2008 training IVT.	EDCA		1/31/2008
IVC11	Establish a list of prospective on-the-job instructors (OJIs).	Establishment of a TAS-wide OJI Cadre to be used in support of the FY 2008 hiring initiative.	Director, Empl Dev		10/31/2007
IVC12	Establish subject matter expert (SME) pools by occupation.	Creation of subject matter expert pool specifically built by occupation to be used for course design projects.	Director, Empl Dev		10/31/2007
IVC13	Phase in implementation of the GS-12 Lead Case Advocate. Emphasize training and coaching.	Complete recruitment, placement, and training of initial cadre of GS-12 Lead Case Advocates.	Director, Recruit. & Hiring		4/30/2008

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVC14	Design a recruitment template for identifying highly-qualified and diverse candidates.	Complete recruitment template. Composition of applicant pools by EEO groups.	Director, EEO		12/31/2007
IVC15	Develop a recruitment plan for filling vacancies for grade 13 and above.	Implement a recruitment plan that includes applicant pools composed of targeted EEO groups.	TAS Leadership		3/31/2008
IVC16	Develop and implement a formal internship program for hiring students through programs such as WRP, Hispanic Association of Colleges and Universities (HACU), Partnership in Education (PIE), etc.	Number of students hired.	Director, EEO		4/30/2008

IV - D Employee Development Opportunities

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVD1	Implement and monitor a tracking system for developmental opportunities within the organization. The National Taxpayer Advocate and the Deputy National Taxpayer have established a working group to formulate a process and tracking methodology that will be consistent with employee development and employee engagement. The process will allow employees to demonstrate interest in developmental opportunities and provide management with a useful tool to expedite selection of interested employees.	Implement tracking system.	Director, Empl Dev		12/1/2007
IVD2	Create a catalog of 20 to 25 distant learning courses for local offices.	Delivery of catalog.	Director, ITAP		10/31/2007
IVD3	Develop and deliver International Tax Training Phase II.	Completion of the course.	Area Director(s)		12/31/2007
IVD4	Develop "hot button topics for managers" regarding labor relations issues in a virtual learning environment.	Deliver virtual hot button topics.	Director, Empl Dev		9/30/2008
IVD5	Conduct the TAS Technical Symposium with a focus on meeting employee needs for more diversified workshops, greater involvement in the development and delivery of the workshops, and increased emphasis on securing feedback on the topic solicitation and selection process.	Delivery of Symposium. Achieve a 90.1 percent level of satisfaction on the training survey.	Director, Empl Dev		8/15/2008

IV - E TAS Four-Year Training Plan

<i>Number</i>	<i>Action(s)</i>	<i>Outcome/Measure(s)</i>	<i>Responsible Official</i>	<i>Support</i>	<i>Due Date</i>
IVE1	The TAS Four-Year Training Plan (4YTP) is a web-based product focused on identifying the training needs of TAS employees based upon competencies that all employees share as well as those that are position specific. TAS is working toward making the programming portion of the plan more efficient. The critical piece of data management appears to be compatible conceptually with the IRS's Electronic Learning Management System (ELMS). TAS is exploring this platform as a more prudent option to house the plan itself. The goal for FY 2008 is to fully integrate the 4YTP and ELMS.	Integration of 4YTP and ELMS.	Director, Empl Dev		9/30/2008

Attachment 2

TAXPAYER ADVOCATE SERVICE - FY 2008 PERFORMANCE MEASURES					
Measure	Description	Source	FY 2007 Actual	FY 2008 Target	FY 2008 Actual
Improve TAS's Ability To Identify and Respond to Taxpayer Concerns					
Overall Quality of Closed Cases	The measure of TAS's effectiveness in meeting customer expectations based on a random sample of cases scored against timeliness, accuracy and communication quality standards.	Centralized Closed Case Review QS 1-8	90.6% ⁷	91.2%	
Timely subsequent actions	Percent of all cases with timely subsequent actions and contacts by the date provided to the taxpayer and by the follow-up dates set by TAS procedural requirements.	Centralized Closed Case Review QS 3	75.6% ⁸	77.6%	
Procedurally correct	Percent of all cases where all the actions taken by TAS and the IRS are worked in accordance with IRM technical and procedural requirements (such as IDRS actions input correctly or proper holds placed on collection activity).	Centralized Closed Case Review QS 6	85.9% ⁹	86%	

⁷ Casework quality results are cumulative results through August 2007.

⁸ *Id.*

⁹ *Id* at 1.

Improve TAS's Ability To Identify and Respond to Taxpayer Concerns					
Customer Satisfaction % Satisfied	Percent of taxpayers who indicate they are very satisfied or somewhat satisfied with the service provided by TAS (Question 12 on Customer Satisfaction Survey).	Customer Satisfaction Survey (Quarterly)	83% ¹⁰	85%	
Identify significant sources of TAS casework and work with operating divisions on strategies to improve case referrals to TAS.					
Systemic Burden Receipts (Efficiency Measure)	Criteria 5 through 7 case receipts divided by criteria 1 through 9 case receipts. Does not include reopened cases.	TAMIS BPMS	65.1%	62.3%	
Ensure the HR Component of TAS is Adequate to Meet Its Workload Demands					
Employee Satisfaction ¹¹	Percent of employees who are satisfied or very satisfied with their job (Question 39 on annual employee survey).	Employee Satisfaction Survey (Annual)	66%	70%	

¹⁰ Year to date third quarter Customer Satisfaction results.

¹¹ Employee satisfaction is measured annually based on the annual Employee Satisfaction Survey.